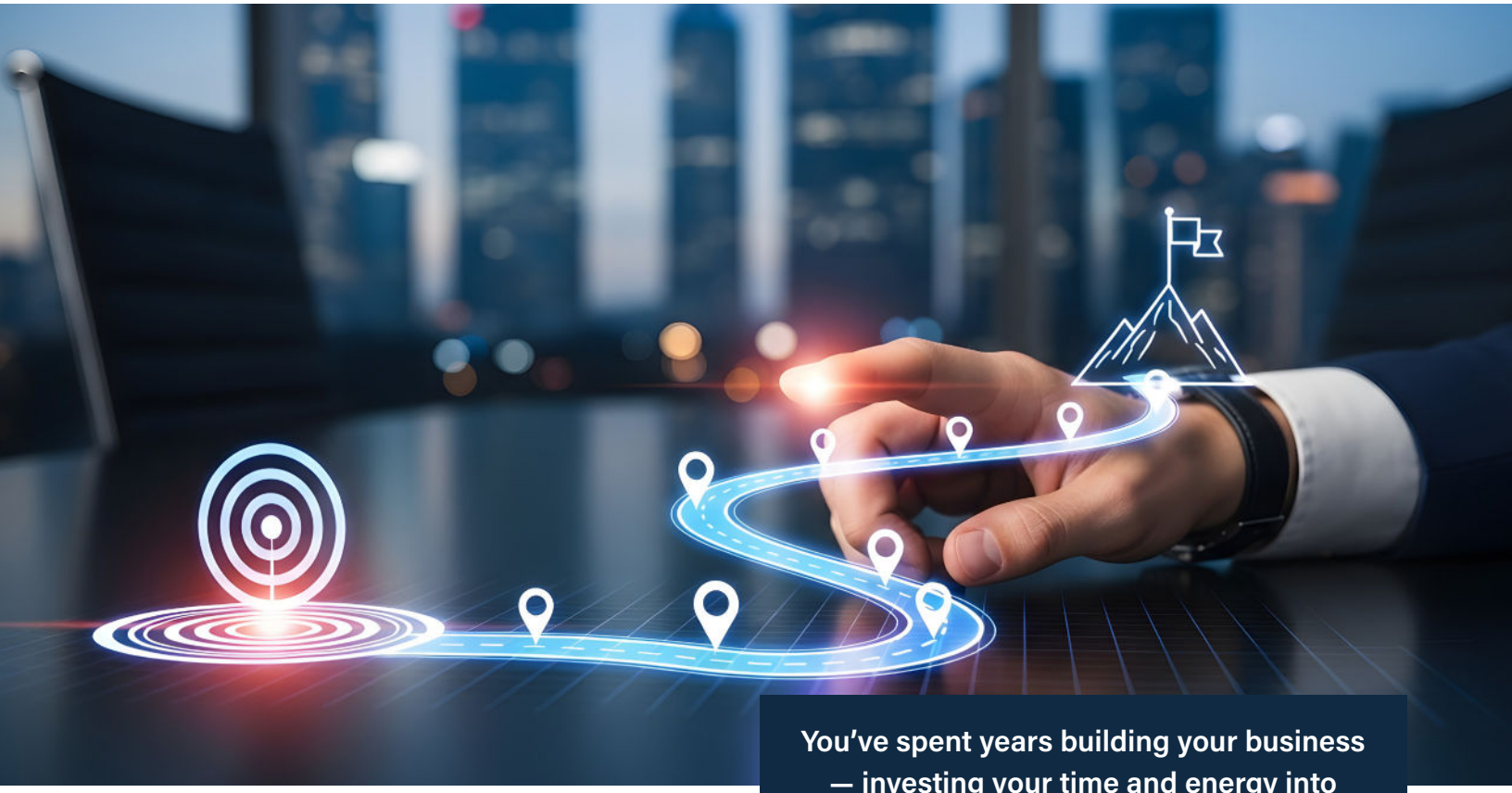
FRAGASSO
WEALTH ADVISORS



You've spent years building your business — investing your time and energy into something that supports your family, your employees, and your community. Yet most owners reach the point of transition without a clear plan for how, when, or to whom they'll eventually transfer their business, or how that decision connects to their personal and financial goals.

Prepare Today for a Stronger Exit Tomorrow

80%
of business owners' net worth is locked in their business.

Snider, Christopher M., Walking to Destiny: 11 Actions An Owner MUST Take To Rapidly Grow Value & Unlock Wealth, ThinkTank Publishing House, 2023

75%
of business owners regret selling just one-year post-sale.

https://exit-planning institute.org/hubfs/Member%20Center%20Resources/2023%20National%20State%20of%20Owner%20Readiness%20Report.pdf

Only 20%
of businesses that go to market actually sell.

2023 Business Enterprise Institute exit-planning survey

Find Your Exit Planning Partner with Fragasso

Our team consists of a Certified Exit Planning Advisor (CEPA®) and a Certified Exit Planner™ (CExP) who will lead a coordinated, strategic process tailored to your unique goals and will help you avoid costly missteps that can delay or derail a successful exit.

Opinion of Value

Most owners don't know what their company is truly worth today or what drives its transferable value. We establish a baseline value for your company and identify what drives or detracts from it.

Business Continuity and Exit Planning

Owners worry about their employees, family dynamics, and preserving the business legacy. We work with you to evaluate internal and external transfer options and create a roadmap for succession or sale. Without a plan, timing, taxes, and emotions can control the outcome.

Personal Financial Planning

Business wealth often represents the majority of personal net worth, but it's illiquid until you sell. We help align the business transition with your personal goals — ensuring you can maintain your desired lifestyle after exit.

Retirement Plan Optimization

By designing or refining your company's retirement plan, we aim to improve outcomes for you and your employees while maximizing tax efficiency.

Coordinated Advisory Network

We work alongside your CPA, attorney, and valuation professionals to create a cohesive, tax-efficient strategy. Failing to plan early can reduce after-tax proceeds and options at sale.

The Benefits to You

CLARITY of knowing your business worth and the path toward your financial goals.

CONFIDENCE that your exit and retirement plans are connected and achievable.

CONTROL the timing, taxes, and legacy you want to leave behind.

CONTINUITY for your employees, customers, and family.

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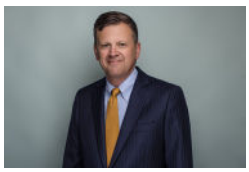
Start the Conversation

Whether you're five years or five months from exit, now is the time to prepare. Let's discuss how we can help you unlock the value you've built, and secure the next phase of your life.



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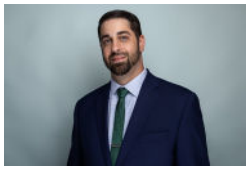

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Investment advice offered by investment advisor representatives through Fragasso Wealth Advisors, a registered investment advisor.